

EIC3600 COMMERCIAL DATABASE SEARCH REQUEST

☐ RUSH - SPE signature required: 09/514,997

Business Methods Case: 705/ 10

Write in 705 subclass(es) to search required files for 705 cases or cases cross referenced in 705.

Staff Use Only

Access DB# _____

Log Number _____

Requester's Full Name: Susanna Diaz Examiner #: 76267 Date: 1/6/04

Art Unit: 3623 Phone Number 305-1337 Serial Number: 09/514,997

Bldg & Room #: Park 5- 7704 Results Format Preferred: PAPER ☒ DISK ☐ E-MAIL ☐

If more than one search is submitted, please prioritize searches in order of need.

Provide the PALM Bib page or the following:

Title of Invention: Automatic Lead distribution and Processing Confirmation

Inventors (provide full names): Axel Schultz

Earliest Priority Filing Date: 2/25/00

Requested attachments:

- If possible, provide the cover sheet, the IDS, examples, or relevant citations, authors, etc, if known.
- Please attach copies of the parts of this case that help explain or are most pertinent to this search. Examples are: abstract, background, summary, claim(s) [not all of the claims].

The claimed or apparent novelty of the invention is:

I am looking for a database of sales leads that are sold to interested parties. A user interested in purchasing a sales lead(s) specifies desired criteria of the sales leads. The user is presented with a list of qualifying leads. The user then selects which leads are of interest to him/her. The selected leads are transferred to a separate database that only the user can access for a predetermined period of time. When this period of time expires, the selected leads are transferred back to the original database for other users to access. If you find this, please also look for a notification to a lead (i.e., the customer) that he/she has been selected by a user.

Thanks,
Susie

Special Instructions or Other Comments

US-PAT-NO: 5930764

Melchioni

DOCUMENT-IDENTIFIER: US 5930764 A

TITLE: Sales and marketing support system using a customer
information database

----- KWIC -----

Detailed Description Text - DETX (348):

The account management component of the CCIS 13 is a system for account officers to use to manage groups of households and/or customers by enrolling them into special programs provided by the financial institution. Once the household or customer is enrolled in a program and is assigned to a personal banker, the personal banker can offer the customer personal relationship management to better manage the customer's banking relationships. The customer will be "flagged" as a managed household to alert other sales staff that the customer has an exclusive relationship with a personal banker. It also guarantees that leads distributed from the micromarketing center 11 are assigned to the personal banker for that customer. The customer has the added benefit of dealing with only one personal banker who understands the customer's needs.